Purpose

Purpose

Use this procedure to create a Travel Request where the employee is required to seek prior approval for Travel, or if a cash travel is needed.

Trigger

Employee is required to see prior approval for travel or requires a travel advance.

Prerequisites

- Employee must be set up in the SAP HR System.
- Employee must be able to log into the ESS portal.

Menu Path

There is no menu path for actions through the Portal.

Transaction Code

Portal

Helpful Hints

- None

Procedure

1. Start the transaction using the menu path or transaction code.

Universal Worklist - SAP NetWeaver Portal

2. Click the **Employee Self-Service** tab .

Employee Self-Service

My Overview - SAP NetWeaver Portal

3. Click the **My Travel and Expenses** tab .

My Travel and Expenses

PageBuilder

4. To the **Create a Travel Request** label .

Create Travel Request

Travel Request

5. Click the **Calendar of Trips** button .

Calendar of Trips

6. Hold the **Shift** key on your keyboard and click on a **Trip Start Date**.
7. Hold the **Shift** key on your keyboard and select a **Trip End Date**.
8. Enter a time in the **Start Date** text box. For this example, enter "7:00 AM".

   The **Start Date** format is listed as HH:MM AM/PM.

9. Enter a time in the **End Date** text box. For this example, enter "9:00 PM".
10. Click in the **Destination** text box and enter the correct Destination. For this example, enter "Charleston".

   The country/Region is defaulted to **US-South Carolina**. If you are traveling outside of South Carolina, change it to **US-Outside South Carolina**.

   If the trip is foreign, select the country from the list. If traveling to Canada or Puerto Rico enter **US-Outside South Carolina**.

11. Click the **Activity** drop-down menu .

12. Select the appropriate activity from the **Activity** list. For this example, select **Conference/Meeting**.
13. Enter the estimated costs in the **Estimated Costs** text box . For this example, enter "300.00".

14. Enter the correct reason in the **Reason** text box . For this example, enter the reason: "To attend buyers conference".

15. Enter in any additional comments in the **Comment** text box .

16. Click on the **Enter Additional Destinations** button only if you have additional destinations during this trip Enter Additional Destinations.

17. Click the Date drop-down to select a date for the **Additional Trip** .

18. Select the **Date**. For this example, select **Day 21**.

19. As required, complete/review the following fields:

    - Additional Destination

20. Click in the **Activity** drop-down menu Conference / Meeting ▾.

21. Select the **Client Services** activity for the second destination.

22. Click the **Accept** button Accept.

    Select the **Accept and New Entry** button to add an additional destination line in the itinerary.

23. Click the **Accept** button Accept when you have entered all destinations.

24. If a cash advance for the trip is required and meets state regulations, click the **Enter Advances** button.

    The Comptroller General requires that a form titled **Request for Official Travel Cash Advance** be submitted with the request, therefore, this form must be completed and imaged as documentation for an advance.

25. As required, complete/review the following fields:

    - Amount

26. Click the **Accept** button Accept.

27. Click the **Save Draft** button to save your work Save Draft.

28. Click the **Review** button Review ▶.

29. Click the **Save** radio button Save if you do not want to submit the request for approval at this time, or if you have documentation to be imaged with this request.

    If this message appears, it means there is not sufficient budget in the account and you must contact the appropriate person in your agency to establish a sufficient budget. (The account distribution information is available when you click on the **Display Form** button.)

30. Click the **Save and Send for Approval** button Save and Send for Approval if you are ready to submit the request for approval and all required documentation has been imaged for this request.

When imaging documents are complete, you will receive a notification that imaging for the specific trip number has been completed. When imaging is completed, follow the BPP for changing a Travel Request, and select the **Save and send for approval** button - this will start the workflow process for approval by your supervisor.

31. Click the **Display Request Form** button Display Request Form.

Display Form - SAP NetWeaver Portal - Windows Internet Explorer

32. Print this travel request and attach any supporting documents. Send it to your agency imaging location for imaging if other documentation attachments are required.

Travel Request

33. Click the **Save and Send for Approval** button Save and Send for Approval when you are ready to submit the request for approval (after imaging of required documents). After the imaging of documents has been completed, you will be sent a notification that the required imaging has been completed for the specific trip number.

When imaging documents are complete you will receive a notification that imaging for the specific trip number has been completed. When imaging is completed, follow the BPP for changing a Travel Request and select the "save and send for approval" button - this will start the workflow process for approval by your supervisor.

34. Click the **Exit** button Exit.

Result

You have successfully created a Travel Request.